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ABSTRACT

This overview of library finance issues examines governance issues at the state level, the nature of state enabling legislation, the organizational framework at the state level, state-local relationships, constituency characteristics and requirements, and governance characteristics at the local and regional levels, as well as the need for improved balance in funding for the public library and subsidy mechanisms used in library support systems. A national study designed to explore and recommend possible linkages in the various state funding streams, policies, and mechanisms in support of all types of libraries is strongly recommended. (JAB)

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GOVERNANCE AND FINANCING OF LIBRARIES IN NEW YORK STATE

by

Rodney P. Lane

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Governance and Financing of
Libraries in New York State

By Rodney P. Lane

A recent study of library planning and decision-making defined the basic objective of libraries as providing for the "--- exposure of individuals to documents of recorded human experience."(1) Shera defines the function of the library as maximizing the "social utility of the graphic record."(2) In the information environment of today's technology the magnitude and potential availability of the "graphic record" is increasing exponentially. Characteristics of the new information environment created by computer and communications technology were defined in a recent report to include the following.(3)

- An exponential increase in the volume of information flow.
- A shrinkage of time and distance constraints upon communications.
- Greater nationwide dependence upon information and communication services.
- An increase in the interdependence of previously autonomous (libraries and related information providing) institutions and services.
- Conceptual changes in economic, social and political processes induced by increased information and communications.

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(1) Library Planning and Decision Making Systems, Morris Hamburg, et al, MIT Press, 1974, p 4.

(2) Jesse H. Shera, "The Public Library in Perspective, " The "The Metropolitan Library," MIT Press, 1972, p 110.

(3) National Information Policy: Report to the President of the United States, Staff of the Domestic Council Committee on the Right to Privacy, Published by NCLIS, 1976, p. 5.

These perceptions of library role and functioning in the world of the present and future provide an appropriate perspective from which to view issues of governance and financing of libraries. The specific nature and extent of the role to be played by libraries in the information age now upon us is by no means clear. Few would doubt, however, the need for expanded networks and increased access to information sources that libraries uniquely and most efficiently can provide. Also, few observers of the societal scene would disclaim the need to increase both the amount and quality of "exposure" of us all to the accumulating record of human experience. There is mounting evidence that neither the volume of information transmitted nor the speed of transmission can serve, separately or combined, as guarantors of improvement in the quality of life in our society. The special role of the library as an "exposure" medium was cited in a recent report.(1)

> It can be argued that the nation suffers from its failure to make fuller use of the written record and from the diminution of contemplative skills and private perceptions attained thereby. Public education, in a compulsory setting, is increasingly criticized for performance failure and there is mounting concern over the steady ten-year decline in high school achievement test scores. The reason for failures in part may be related to factors producing a reduced use of the public library. The point is that in coming to terms with these problems, we can and should alter radically the forms and structures used in providing public education and public library services, but we cannot conclude that learning itself is no longer relevant to the needs of a modern society, or that public libraries have outlived their usefulness.

(1) Alternatives for Financing the Public Library, National Commission on Libraries and Information Science, 1974, p. 5

The governance and financing of any public (or private) function reveals, more than any other set of indicators, the nature and degree of social commitment in providing the services or carrying out the function involved. The perspective for viewing library governance and finance issues described above suggests a high priority assignment for resolving such issues, and a careful review of present status and future requirements as a part of that process.

Governance Issues at the State Level

Under our federal system of government, there should be no question about the legal primacy of the states' role in the development and maintenance of library and information services. It sometimes comes as a shock to home-rule advocates that under a well-recognized point of municipal law, local governments (including school districts) are creatures of the state and have no inherent powers apart from those granted by the state. (1) Existence of an iron-clad legal base underpinning state authority and responsibility, of course, does not insure its easy implementation. Not long ago, state governments, in general, were viewed as operationally weak. It has been the growth in size and importance of problems and service needs which transcend local boundaries, coupled with the establishment of new broad-based state taxes and incentives provided by the Federal government, which have expanded and strengthened state government operations.

(1) Local Government Reference Manual #4, The Pennsylvania Constitution Convention, 1967-68, p. 5.

Development of the state governance role with respect to libraries was influenced by the changes indicated above and by factors more closely related to the history and nature of library services. Public libraries were nourished by private philanthropy and grew as an almost wholly local institution. State government entry as an administrative planning and fiscal support agency for public libraries came late and at a relatively slow rate of development. Viewed nationally, the state's emergence as a consistently strong, policy making administrative and fiscal force for public library development is far from complete. The stimulus for state library agency development provided by the Federal library legislation (LSA and LSCA) was substantial, but the focus of these Acts was not primarily on building a strong library administrative agency in each state.

The development of a state library agency began, in most states, with the creation of a state library to serve lawmakers, judges and governmental executives in and near the state capitol. These state libraries began to be established in the early 19th Century and by 1876 existed in all states. Expansion of their function occurred in the late 19th and early 20th centuries when, as state libraries or library commissions, they were given responsibility for extension of library services to rural and other unserved areas. Typically, this limited responsibility was far less than a mandate to establish a state-wide pattern of library services.

There are at least five interrelated aspects or components against which individual state governance characteristics can be compared and generally evaluated. These are by no means standards, but they are guides for examining the nature and quality of governance. These aspects are: (1) nature of mandate or enabling legislation, (2) organizational frame-work and administrative structure, (3) financing level and mechanisms, (4) state-local administrative relations and (5) existence and nature of the constituency supporting the function. The relative importance of each aspect or component, as discussed briefly below, will vary in different states and at different times. The finance component will be examined in greater detail in a later section.

Nature of State Enabling Legislation

The basic ingredient of the enabling legislation supporting state library activities is whether these services are mandated or are merely permitted. Administratively, it is of great value to have provisions mandating services and a commensurate definition of state agency role in providing such services. The legislative mandate for public education services might be considered as an appropriate model.

There is no question about either the mandated nature of public education service or the state responsibility related thereto. State library legislation generally falls far short of this goal. Public library services are not mandated in any state. School library services, if mandated at all, are services

which are required by regulations relating to the educational function, or they are services required to obtain accreditation. In New York State, the nature and intent of the systems legislation calls for a strong program, but the Act does not require a minimum level of library and information service available to all citizens.

Organizational Framework or Structure

The outstanding characteristic about state library organization and administrative structure in the 50 states is the predominance of independent boards and commissions. Given the history of library development, it is easy to understand why a state library board or commission with administrative powers was used as the most common type of organizational structure. However, as state governments have grown, the weaknesses and disadvantages of this plural executive organizational form have generally out-weighed the advantages. State government reorganization activities and state constitution revisions generally have served to reduce the number of state governmental units, independent boards and commissions. Under this pressure, and for other reasons, state library agencies are usually consolidated with state education agencies, or with some type of cultural or community agency. At the present time, 17 state library agencies are under a separate board or commission, 20 are in state educational agencies, and 13 are a part of some other state department or unit. Changes in the field of public education and the general broadening of the educational purview to include more socialized educational models further support placement

of the library function in the educational agency. Earlier research has demonstrated that libraries fare better in a department of education setting.(1)

New York exhibits an interesting organizational pattern in that the state library is an integral part of a state education agency concerned with all types of educational institutions, including privately supported and state assisted post-secondary institutions, and that this agency is governed by a Board of Regents. This arrangement would fit the general pattern of a desirable organizational structure and provide the opportunity for programmatic interactions among all types of libraries.

State-Local Relations

The central ingredient in state-local library service relationships involves the role of local government and the functional problem of meeting service requirements on a multi-jurisdictional basis. Aspects of this problem, unique to libraries, involve the essentially local and often quasi-governmental status of community libraries and their strong adherence to local autonomy. Related, and sometimes in opposition, to these factors is the need to develop cooperative and coordinated multi-jurisdictional networks which are part of state-wide, regional and national library and information systems. The increasingly urgent need to develop and expand

(1) State Library Policy, St. Angelo, Hartsfield and Goldstein, American Library Association, Chicago, 1971.

inter-type library networks coordinating and integrating public school and other libraries is a related high priority problem. It seems plain, then, that the state library agency must be clothed with more than the power to negotiate or to provide leadership. To function effectively in developing patterns of coordinated library services, it must have a commensurate responsiblity which is broader than simply the administration of public library services. Artful persuasion and leadership are always required in public affairs, but they are no substitute for a clear assignment to the state agency of decision-making responsibility and authority essential to the development of a coordinated pattern of library services. On the other hand, state agency interest and responsibility for developing an integrated network of libraries should not obscure nor dilute the basic state responsibilites for insuring the availability of adequate local library services. The pattern and purpose of state-local relations should be to maximize library services for all citizens.

Constituency Characteristics and Requirements

The nature and extent of the constituency which supports libraries is in many respects phenomenal. Almost no one is either opposed to or apathetic about the public library as a community institution. This, in large part, may be due to the essentially local nature of the public library - with its partly private sponsorship and philanthropic roots. Now, however, libraries look to government for their primary support. It is worthy of note that in the growth of the governmental support

base the library has picked up little, if any, of the stigma too frequently associated with governmental service programs and their attendant bureaucracies. The other side of this coin is that libraries have too often used their constituent support to retain a removed and isolated position. Bebout addresses this point directly and describes future requirements in blunt terms.[1]

> Public libraries that are worth their salt are no longer the somewhat cloistered institutions of local cultural benevolence that many of them once were--- As institutions, however, they are caught in a vast web of governmental organizations and practices - national, state, local - that has come to be called partnership federalism. --- Libraries, quantatively miniscule elements in the system, have hardly sensed the implication of this evaluation for either their institutional integrity or their function in society.

Similarly, public attitudes toward other types of libraries are generally supportive, but questions arise increasingly about school - public library relationships and the duplication or overlapping of services. The trick for state library agencies, today and in future years, is to weld together the many and separate constitutencies to support integrated library and information networks and service programs. The objective is no less than to maximize library and information resources and to improve the access to those resources for all citizens.

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(1) John E. Bebout, Partnership Federalism, "The Metropolitan Library, MIT Press, 1972, p. 73.

The White House Conference scheduled for September 1979, and the state preparatory conferences, can represent a giant step forward in coalescing library constituencies and elevating their sights toward this goal.

Governance Characteristics of Local and Regional Levels

The governance characteristics of libraries at local, county and regional levels vary by type of library and, from state to state, in accordance with variations in the structure of local government and the pattern of state-local relations. Perhaps it is because of these wide and complex variations that there has been little research on this subject supporting general guidelines for suggested local governance arrangements. As the need to develop operating and network linkages among different types of local libraries increases, however, the need to come to terms with local governance issues will likely also increase.

Local governance patterns for school libraries are fairly consistent and clear: these services and facilities are under the control of the local education agency (school district) which functions legally as an arm of the state educational agency, but which, typically, also has administrative and fiscal relationships with the local general purpose government. The constituency of the school library at the local level, by and large, is a part of the general constituency for local education.

The outstanding governance characteristic of the public library at the local level is its independent or quasi-independent operating status. While some of the more urban jurisdictions may have charters or ordinances which establish a public responsibility for public library services, many (perhaps most) public libraries function under independent boards or committees supported by little or no legislative sanctions. A somewhat similar situation exists at the county level. Charters and ordinances in some counties, particularly the more metropolitan counties, may establish or permit a county government library function, or they may call for the development of a county system of public libraries. The impression is, however, that a definitive kind of legislative base at the county level is far more the exception than the rule. It is certainly true that a county legislative base for the development of a coordinated network of inter-type library services seldom, if ever, exists.

There are an increasing number and variety of regional governmental instrumentalities and mechanisms throughout the nation. Most of them are organized as special purpose agencies in such fields as health, environmental control, transportation, planning, etc. Most exist on the basis of legally-based agreements among local and/or county governmental jurisdictions, or as extensions of a state governmental department or agency. None of these regional agencies can be classified as general

purpose governmental units with taxing authority and officials elected on the basis of a region wide constituency. New York, Pennsylvania, Illinois, and some other states have established regional library instrumentalities, but the authority base under which these regional agencies operate is that granted by state law and/or agreements among independent sub-regional units rather than any generic regional governmental mandate.

This summary of local and regional governance characteristics for libraries has not included academic and special libraries which are privately owned and operated. While such institutions may receive government funds and may operate in networks with public and school libraries, they are not otherwise subject to governmental oversight.

This review of governance characteristics for libraries at local, county and regional levels has stressed the gaps, limitations and deficiencies that exist. It is clear that, while many of these problems have not yet surfaced as issues impacting on the development of library services, they are likely to do so in the not too distant future. Development of library and inter-type library systems which bridge political jurisdictions may produce governance problems of different dimensions. Complex board and membership structures for these systems may be required, but care should be taken that they do not emphasize an aggregation of local and institutional concerns over system-wide and user interests. However, governance related improvisations supporting the development of local, county and

regional library systems have been created in the past. The need for more effective improvised governance arrangements for such systems will continue. Expanded use of the county as a base for area-wide library systems may hold promise. As indicated earlier, an outstanding characteristic about libraries in general - and the public library in particular - is the strength of the broad-based, grass-roots support that the institution enjoys. In wrestling with emerging governance issues at local and regional levels, great care should be exercised to retain, enhance and make more effective that constituency.

Finance Issues

There is little question that this nation places a high value on the acquisition of knowledge and information. In the decade ending in 1974, the United States spent some $57 billion for space research and technology. In 1975, Federal, state and local expenditures for local schools amounted to $61.5 billion. By way of comparison, in 1975, total Federal, state and local expenditures for public libraries was $1.1 billion.[1] In the same year, total operating expenditures for all kinds of libraries amounted to $2.4 billion.

Nationally, libraries are viewed by many observers as an underdeveloped knowledge and information resource and there is evidence to indicate that the situation is worsening. The

(1) National Center for Educational Statistics, Release 76-192, January 28, 1976.

national inventory study completed for NCLIS in 1977[1] estimates total national expenditures required to operate all libraries at an adequate level in 1975 at $8.7 billion or 3.5 times the $2.4 billion reported for that year. This gap of $6.3 billion in operating expenditures affects all types of libraries. According to the inventory study, public libraries are short by $1.0 billion, school libraries are short by $4.7 billion, and the gap in academic libraries is $.6 billion. An estimated 91 percent of the nation's population is served by public libraries not meeting expected per capita operating expenditures. In New York state, the gap in operating expenditures of public libraries is $29.3 million and an estimated 56 percent of the population is served by public libraries with less than expected operating expenditures.

A general indication of the worsening of the fiscal condition of libraries is shown in the comparison of expenditures for public library services related to population and personal income. Table 1 compares changes between 1972 and 1975 for the nation and New York State.

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(1) National Inventory of Library Needs, 1975. NCLIS, Table 1.2, Table 4.27, Table 4.28A.

Table 1

Public Library Expenditures Per Capita and
Per Thousand Dollars of Personal Income

		1975	1974	1972
Per Capita:	U.S.	$5.83	$5.15	$4.38
	N.Y.	9.73	8.83	7.63
Per $1000 of Personal Income:	U.S.	.97	.94	1.05
	N.Y.	1.47	1.43	1.53

Source: Evaluation of the Effectiveness of Federal Funding of Public Libraries, NCLIS, 1976, Table 6.

Expenditures per capita, in the United States and in New York have risen since 1972, but expenditures per $1000 of personal income have declined. In New York, part of the decline in expenditures/income rate was recovered in 1975, but the rate was still lower than in 1972. This means simply that while budgets for public library services have increased during this period, the increases are less than required by spiraling costs and inflation. Thus, we are falling behind nationally and in New York State, in meeting requirements for library and information services.

The Public Library in Competition for Local Tax Dollars

Comparative analyses of an array of people-oriented public services shows that public libraries are not doing well in the competition for the local tax dollar. As shown on Table 2, and

graphically on Chart 1, when the public library function is related to four other people-oriented activities of local government -- local schools, health and hospitals, police, and parks and recreation -- libraries have not fared well fiscally. Indeed, the library has lost ground, dropping from 1.3 percent of the $39.1 billion spent for the five functions in 1967 to 1.2 percent of the $103 billion in 1976. In the comparison of these expenditures, if libraries had spent in 1976 at the same percentage of the total as in 1967, the library total would have been $120 million more than $1,249 million shown in 1976. As shown graphically on Chart 1, the percentage increase in library expenditures 1967-1976 was less than for any other function. Clearly, library expenditures have not kept pace with those for other people-oriented service programs.

Table 2

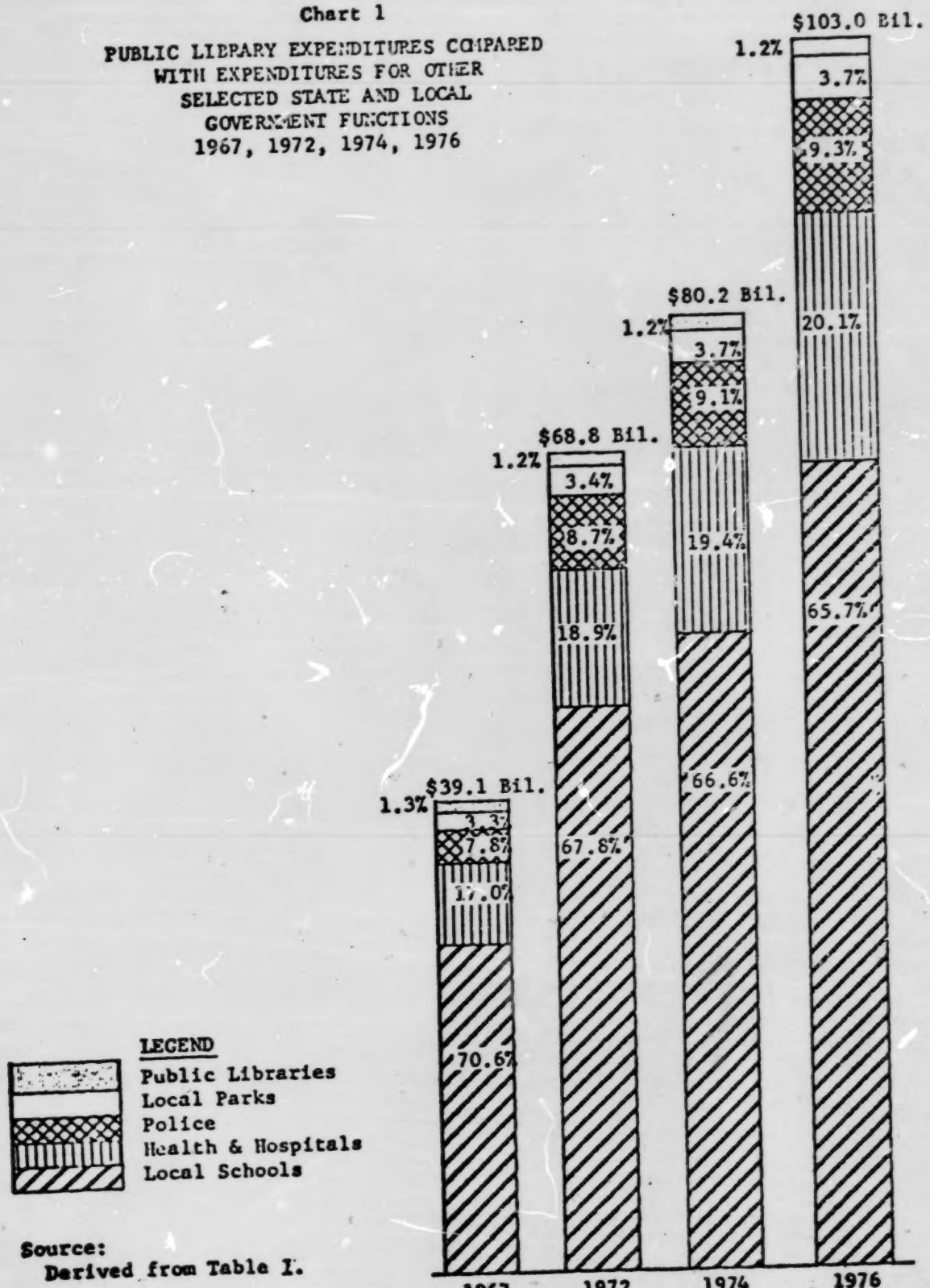
Comparison of Expenditures for Selected State and Local Government Functions, 1976, 1975, 1974, 1972 and 1967
(in millions)

Selected Functions	Expenditures				
	1976	1975	1974	1972	1967
Public libraries	$1,249	$1,119	$ 968	$ 816	$ 518
Local schools	67,674	61,485	53,059	46,671	27,590
Health and hospitals	20,686	18,847	15,945	13,023	6,640
Police	9,531	8,387	7,289	6,005	3,049
Local parks and recreation	3,864	3,462	2,951	2,818	1,291
Total selected functions	$103,004	$93,300	$80,212	$69,833	$39,088
%Public libraries of total	1.21%	1.20%	1.21%	1.19%	1.33%

Source: Bureau of the Census, Governmental Finances in 1973-74, & 1975-76, Census of Governments, 1967, Vol. 4, No. 5: Compendium of Government Finances; and Census of Governments, 1972, Vol. 4, No. 5: Compendium of Government Finances. Government Finances in 1974-1975.

Chart 1

PUBLIC LIBRARY EXPENDITURES COMPARED WITH EXPENDITURES FOR OTHER SELECTED STATE AND LOCAL GOVERNMENT FUNCTIONS 1967, 1972, 1974, 1976



Source:
Derived from Table I.

The Need for Improved Balance in Funding the Public Library

Support for libraries comes from all three levels of governments. The outstanding characteristic about the public library financing "system" is the overwhelming percentage of total expenditures provided by local governments. The percentage of funds from each source for the years 1972, 1974 and 1975 is shown below.

Table 3

Percent of Public Library Expenditures
Provided by Federal, State and Local Governments

Source	1975	1974	1972
Federal	5.0%	4.3%	5.8%
State	12.9	12.4	10.8
Local	82.1	83.3	83.4

Comparable figures for New York, are as follows:

Federal	2.1%	2.0%	3.0%
State	17.1	14.9	14.8
Local	80.8	83.1	82.2

Source: Evaluation of the Effectiveness of Federal Funding of Public Libraries, NCLIS, Table 5.

There is increasing recognition that public libraries and information services are best supported by a balanced intergovernmental funding system. The National Commission on Libraries and Information Services (NCLIS) has pointed out[1]:

(1) Toward a National Program for Library and Information Services, NCLIS, 1975, p. 14.

--- recent developments give disturbing evidence that public libraries are seriously threatened by deficit budgets resulting from cuts in municipal budgets or failure to get Federal revenue sharing funds. Balanced intergovernmental funding at the local state, and federal levels is essential to achieve the content and quality of public library services commensurate with the needs of modern society.

A report prepared for NCLIS by the author of this paper suggests, as a long range guide for achieving improved balance in public library financing, a Federal share at 30 percent - declining to 20 percent, a state share of 20 percent - increasing to 30 percent, and a local share of 50 percent - decreasing to 30 percent.[1] Based on this kind of a guide, the distribution of funding in New York, shown in Table 3, is better than the national average, but there is still a long way to go to achieve a better balance. The percent of support from state sources increased in 1975, and the proposed New York State Library and Information Services Bill, now pending, would provide an additional $9 million in state-aid funds. Nonetheless, major support still falls on local governments whose primary source of local revenues is the over-burdened and inelastic real estate tax.

A local share of public library costs at the 50 percent level would be quite in keeping with the distribution locally of public school costs. In 1974, for the United States as a whole, only 49 percent of expenditures for local schools came from local sources while the state provided 43 percent and the Federal government contributed the remaining 8 percent. In New York, the 1974 figures were 56 percent local; 39 percent state, and 5 percent Federal.

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(1) Alternatives for Financing the Public Library, NCLIS, 1974, p. 69.

Subsidy Mechanisms Used in Library Support Systems

No overview of library finance issues would be complete without some inspection of the subsidy mechanisms which provide fiscal support. Funds come from all three levels of governments, for not only the public library as indicated above, but to some extent also for school, academic, and special libraries. The emphasis in this inspection is on the public library subsidy mechanism since, among the types of libraries, it is an institution which stands quite alone and, as we have seen, is currently subject to special fiscal vulnerability. It is important to note, however, that school and some academic libraries are also being subjected to severe cutbacks and funding problems.

Public library state-aid systems and subsidy formulas are crude fiscal support instruments compared to those supporting public education. The major portion of public library aid is provided through per capita, flat, or discretionary grants. Nationally, in 1975 nearly 3/4 of all state funds were distributed through such grants. In New York, a complex set of factors is used, but about 60 percent of state-aid money is distributed in the form of per capita grants. Other components include an annual grant to encourage multi-county systems, a varying amount to systems which serve larger areas, a book reimbursement factor, and an amount for central library development. In New York's proposed State Library and Information Services Program Bill,

state aid would be increased to cover inflation costs. Also, state aid is linked to local support, and the amount per dollar of local support is greater in urban districts where operating costs are usually higher. Other refinements are included.

Generally speaking, public education aid systems are much more refined and responsive to variations in local district fiscal capacity to support educational services and differences in service requirements designed to meet special needs of categories of pupils. The great proportion of local school aid funds is distributed through equalization formulas which have been improved in response to constitutional and fiscal equity issues raised in the Serrano vs. Priest case (California Supreme Court) and in the San Antonio School District et al. v. Rodriguez et al. case (U.S. Supreme Court). Briefly, these cases, and their counterparts in many other states, have established the fiscal principle that the quality of a students public education should not be determined by the taxable wealth of the local school district in which the student resides. This means that any state education subsidy formula providing funds to local school districts must take into account each district's taxable wealth as a factor in determining the amount of state-aid the district receives. While this principle is stated in fiscal terms, it is designed to insure the equality of educational opportunity for all public school pupils. A related principle in the achievement of educational opportunity though fiscal mechanisms is one which takes into account differences in educational service needs. At the national

level, Title I of the Elementary and Secondary Education Act of 1965 provides local educational funds on the basis of this principle. Many states here similar mechanisms in their educational subsidy systems. To some extent, these same principles are operative in support of school libraries since they are part of the educational system, and they should apply with equal relevance in public library subsidy systems. They are especially important in library systems in which a minimum level of library services is mandated.

There is one last library finance issue which should be stressed. There is a real and present need for a national study designed to explore and recommend possible linkages in the various state funding streams, policies and mechanisms in support of all types of libraries. ALA has outlined such a study and is currently seeking funding under the HEA II-B program. The analyses can provide guidelines which state library agencies can use to improve their own funding systems. From a fiscal viewpoint, the future must bring closer coordination, expanded access, and more effective utilization of <u>all</u> publicly supported library and information service resources. This is not to propose a funding system to produce a monotholic structure or jointure of all library resources. It is to suggest strongly, however, that

adequate public funding of separate, overlapping, or duplicate library systems is not a likely reality of the future. Increasing demands on tax resources, particularly local tax resources, will not permit sustained funding of duplicate or overlapping services. No state, as yet, has made any substantial effort to examine, rationalize, or relate the funding mechanisms and systems supporting the various types of libraries. Incentive funding for inter-type library networks would be explored, in the study described above, as a way to increase library and information service utilization. This needs to be done, and soon, with the goal of providing a sounder, more responsive fiscal policy for the support of all libraries.

Notes on Author

Rodney P. Lane is Senior Associate, Government Studies & Systems, Philadelphia, Pennsylvania. Mr. Lane has served as consultant and authored numerous research studies on libraries including a position paper for the Pennsylvania Governor's Conference on Libraries and Alternatives for Financing the Public Library prepared for the NCLIS. In addition he authored Improving State Aid to Public Libraries for the Urban Library Council.